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NC E-Procurement  
NCASBO Conference  
February 2013

## Introduction & General Statistics

## New NC E-Procurement Features

## Catalogs

## eQuote

## Approval Flows

## Questions & Answers



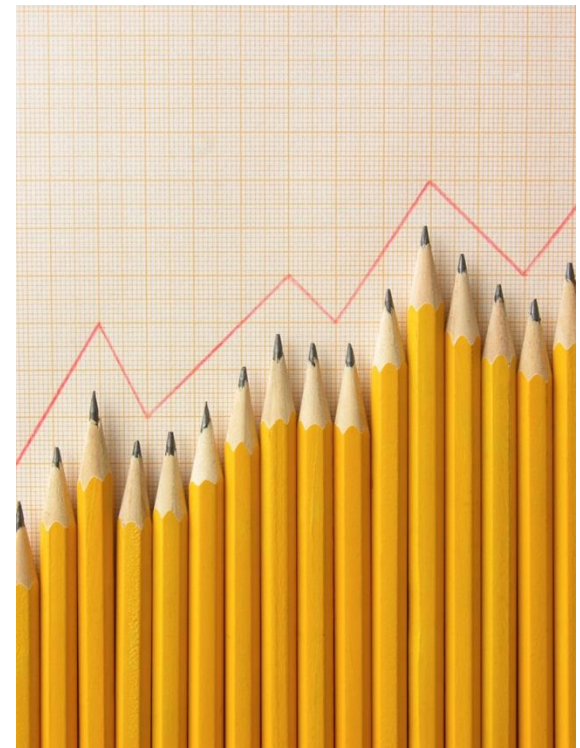
# Introduction to NC E-Procurement

*NC E-Procurement provides the tools to improve the way the State of North Carolina purchases goods and services.*

- Users are empowered to use online requisitioning with direct access to State Term Contracts via **online catalogs**
- Entities can choose to **decentralize the purchasing process** to the people needing supplies within their organization
- The **eQuote tool** allows users to submit requests for quotes to vendors for items below the formal bid requirements, replacing more manual quoting processes
- Orders and internal approvals are **routed electronically** and maintained for accountability

## General Statistics

- NC E-Procurement first went live with pilot agencies in **October 2001**
- NC E-Procurement **Upgraded** the system in July 2012
- **228 different NC entities** now use NC E-Procurement
  - 40 State agencies/Institutions
  - 58 Community colleges
  - 115 K-12 Local school systems (LEAs)
  - 15 Local governments
- Over 8,000 NC users
- Over 45,000 registered vendors
- Over **4 Million** purchase orders issued
- ~ **\$25 Billion** in spending processed through the system
- ~ **530 electronic catalogs** representing over 140 Statewide Term Contracts available to users



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**New NC E-Procurement Features**

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## New Features & Functionality

*The Ariba Buyer Upgrade project provided new features and functionality to make purchasing processes easier for all users, including:*

- **Dashboard Style Home Page**
  - Easy access to Unified Search, My Documents, and To Do content
- **Requisitioning made easier**
  - No more wizards, select the item you need and add it to your cart
- **Approval flow optimization**
  - Increase requisition process efficiency while maintaining required accountability.
- **Catalog Enhancements**
  - Stem searches, fuzzy search and side-by-side catalog item comparison
- **Set Tax Rate by Entity**
  - Each entity can identify the default tax rate specific to their entity
- **Updated NIGP commodity code structure**
  - Using a more current version added over 1,800 additional commodity codes to choose from

## New Functionality Highlights

***Users can search for any transaction directly from the Home Dashboard. My Labels are used to organize transactions.***

**NCE-Procurement** Ariba® **Spend Management**

@your service Home Create Search Manage Recent Preferences Welcome Laura Haakenson

### Home Dashboard

**Common Actions**

- Create
  - eRequisition
  - Address Maintenance
  - User Maintenance
- Manage
  - Receive
  - Administrator
  - Reports

**Recently Viewed**

- RQ20000005 U...d Requisition

**Purchasing Links**

- E-Procurement Resources
  - [NC @ Your Service Portal](#)
  - [Customer Service](#)
  - [Punchout Catalog Availability](#)
  - [Registered Vendor Search](#)
- Purchasing Sites of Interest
  - [Purchase & Contract](#)

**Search**

Catalog
 Keywords:  Search

eRequisition  
Direct Order  
ERP Order  
Purchase Order  
Receipt  
More...

**APPLIANCES, ELECTRICAL, CLOCKS** (7122)  
 APPLIANCES (8)  
 ELECTRICAL EQUIPMENT (7114)

**BUILDING MATERIALS, MAINTENANCE** (2)  
 031-11: Blowers: Industrial Types (2)

**CLOTHING & TEXTILE ITEMS** (110)  
 CARPET AND FLOOR MAINTENANCE AND MACHINES (110)

**EDUCATIONAL & ATHLETIC EQUIPMENT, SUPPLIES** (2)  
 580-10: Band Instruments and Accessories (2)

**FOOD & RELATED ITEMS**  
 165-92: Vending Machines, Non-Refrigerated (1)  
 740-85: Vending Machines, Refrigerated (1)

**FURNITURE (OFFICE, EDUCATIONAL AND HEALTH CARE)** (1663)  
 420-00: FURNITURE: CAFETERIA, CHAPEL, DORMITORY, HOUSEHOLD, LIBRARY, LOUNGE, SCHOOL (484)  
 425-00: FURNITURE: OFFICE (1179)

**OFFICE EQUIPMENT & SUPPLIES/PAPER/PRINTING** (3210)  
 OFFICE EQUIPMENT AND SUPPLIES (2999)  
 PAPER AND PAPER PRODUCTS/PLASTICS (57)  
 080-65: Service Awards, Specialty Type (98)  
 395-00: FORMS, CONTINUOUS: COMPUTER PAPER, FORM LABELS, SNAP-OUT FORMS, AND FOLDERS FOR FORMS (56)

[More Categories ...](#)

**To Do**

ID	Date ↓	From	Status	Title	Required Action
No items					


**My Documents**

ID	Title	Date ↓	Status
RQ20000005	Untitled Requisition	4/22/2012	Composing
UP61	New User Profile for Laura Haakenson	4/22/2012	Processed

[View List ...](#) (2)

# New Functionality Highlights

*The Catalog Navigation Panel allows users to quickly refine search results.*


**A R I B A\***
**SPEND MANAGEMENT**

[Home](#)
[Create](#)
[Search](#)
[Manage](#)
[Preferences](#)

[Home](#) | [Logout](#)

Welcome Laura Haakenson

[Customize](#)

**Supplier**  
B.W.Wilson Paper Co. (6)  
DOVE DATA PRODUCTS, ... (5)  
GODWIN MFG CO INC (22)  
Hampden Engineering ... (1849)  
SOUTHERN ... (4497)  
Show All ...

**Language**  
English (15313)

**Favorites**  
- Recent Choices -

**RQ20000005: Untitled Requisition**

Items: 0 Total: \$0.00000 USD


[Summary](#)
[Exit](#)


Add items to your requisition from the catalog or from your favorites groups. You can also enter details for non-catalog items.


[Catalog Home](#)


Browse By: [Categories](#) | [Suppliers](#)


[Create Non-Catalog Item](#)



**APPLIANCES, ELECTRICAL, CLOCKS** (7122)  
APPLIANCES (8)  
ELECTRICAL EQUIPMENT (7114)



**BUILDING MATERIALS, MAINTENANCE** (2)  
031-11: Blowers: Industrial Types (2)



**CLOTHING & TEXTILE ITEMS** (110)  
CARPET AND FLOOR MAINTENANCE AND MACHINES (110)



**EDUCATIONAL & ATHLETIC EQUIPMENT, SUPPLIES** (2)  
580-10: Band Instruments and Accessories (2)



**FOOD & RELATED ITEMS**  
165-92: Vending Machines, Non-Refrigerated (1)  
740-85: Vending Machines, Refrigerated (1)



**FURNITURE (OFFICE, EDUCATIONAL AND HEALTH CARE)** (1663)  
420-00: FURNITURE: CAFETERIA, CHAPEL, DORMITORY, HOUSEHOLD, LIBRARY, LOUNGE, SCHOOL (484)  
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080-65: Service Awards, Specialty Type (98)  
395-00: FORMS, CONTINUOUS: COMPUTER PAPER, FORM LABELS, SNAP-OUT FORMS, AND FOLDERS FOR FORMS (56)


**POLICE & SAFETY EQUIPMENT** (299)  
680-00: POLICE EQUIPMENT AND SUPPLIES (165)  
345-32: First Aid Cabinets, Kits, and Refills (134)


**SERVICES (CONTRACTUAL & CONSULTANT)** (1860)  
910-09: Carpet Cleaning, Dyeing, Installation and Repair (1)  
918-28: Computer Hardware Consulting (5)  
920-31: Installation of Computers, Peripherals, and Related Equipment (Including Software) (8)  
More ...


**TECHNOLOGY ITEMS** (2029)  
880-46: Projection Stands, Tables, etc., Standard and Rear-Projection Types (2)  
COMPUTERS AND RELATED ITEMS (2027)


**TRANSPORTATION (VEHICLES & SUPPLIES INCLUDING MARINE)** (40)  
TRANSPORTATION, VEHICLES AND SUPPLIES (40)


**Uncategorized Items**





# New Functionality Highlights

*Users can now search for values by entering the search criteria directly in the field and clicking “Enter”.*

**NCE-Procurement**  
@your service

ARIBA\*

SPEND MANAGEMENT

[Home](#) | [Help](#) | [Logout](#)

Welcome Scarlett Swain

[Create](#) [Search](#) [Manage](#) [Recent](#) [Preferences](#)

RQ20000636: Untitled Requisition

Items: 0

Total: \$0.00000 USD

OK

Cancel

If you cannot locate an item in the catalog, request a non-catalog item using the fields below. Non-catalog items may take longer to process because your purchasing department may get involved to complete the order. Add the ...

Full Description: \* Enter a description for this item.

Commodity Code: \* 485

Supplier: Search for more...

Location: (no value)

ItemID: (none selected)

WarehouseID: (none selected)

Bid Number: (none selected)

Supplier Part Number:

Recycled Content? ☐ Yes ☒ No

Item Classification: Good

Contract Type: No

Blanket Purchase? ☐ Yes ☒ No

Quantity: 1

Unit of Measure: each

Stock Keeping Unit:

Conversion Factor: 1

SKU Quantity: 1

Price: \$0.00 USD

Tax Rate: Other

Tax Amount: \$0.00 USD

Amount: \$0.00000 USD

Update Total

ACCOUNTING - BY LINE ITEM


Company: (none selected)

Account: (none selected)

Center: (none selected)

## New Functionality Highlights

*The “Search for more...” option will now produce a pop-up window with related search results. Commodity Code selection has been improved; users will now be able to drill through the commodity hierarchy, as well as searching on keywords in the description.*



ARIBA\*

SPEND MANAGEMENT

Home

Create

Search

Manage

Recent

Preferences

Welcome Scarlett Swain

RQ20000636: Untitled Requisition

If you cannot locate an item in the catalog, re

Full Description:

\* Enter a description for

Commodity Code:

\* 485

Supplier:

(No Preference)

Location:

(no value)

ItemID:

(none selected)

WarehouseID:

(none selected)

Bid Number:

(none selected)

Supplier Part Number:

Recycled Content?

☐ Yes ☒ No

Item Classification:

Good

Contract Type:

No

Blanket Purchase?

☐ Yes ☒ No

ACCOUNTING - BY LINE ITEM

Company:

(none selected)

Account:

(none selected)

Center:

(none selected)

Choose Value for Commodity Code

Field: Name

485

Search

Name ↑	ID	
▶ 145-00 - BRUSHES (SEE CLASS 485 FOR JANITORIAL TYPE)	145-00	Select
435-70 - Skin Cleaners, Antimicrobial: Emollient, Nonalkaline, etc. (See Class 485 for Janitorial Hand and Skin Cleaners)	435-70	Select
435-72 - Soap, Surgical Scrub (See 485-85 for Janitorial Type Scrubbing Soap)	435-72	Select
436-70 - Skin Cleaners, Antimicrobial: Emollient, Nonalkaline, etc. (See Class 485 for Janitorial Hand and Skin Cleaners), Environmentally Certified Products	436-70	Select
436-72 - Soap, Surgical Scrub (See 485-85 for Janitorial Type Scrubbing Soap), Environmentally Certified Products	436-72	Select
▶ 485-00 - JANITORIAL SUPPLIES, GENERAL LINE	485-00	Select
630-45 - Paint and Varnish Removers (Includes Painted Graffiti Removers) (See 485-16 for Other Types of Graffiti Removers)	630-45	Select
631-45 - Paint and Varnish Removers (Includes Painted Graffiti Removers) (See 485-16 for Other Types of Graffiti Removers), Environmentally Certified Products	631-45	Select
810-27 - Fogging Machines for Outdoor Service (See 485-60 for Room Type)	810-27	Select

Done

Total: \$0.00000 USD

OK

Cancel

olved to complete the order. Add the ...

▼

Update Total

Local intranet | Protected Mode: On

100%

## New Functionality Highlights

***Error Messages are summarized at the top of the screen and each individual error is highlighted with the explanation on the field encountering the problem.***

*Selecting the correct Commodity Code provides better purchase history and through captured data helps P&C and IT Procurement in the process of establishing term contracts.*

Tips for finding and using the correct Commodity Code:

- Use 900 series commodity codes for **services** and non 900 commodity codes for **goods**
- Include goods and services as separate line items on a purchase order using the **appropriate commodity codes**
- **Freight** should be entered as a separate line item with '962-86 Transportation of Goods (Freight)' as the commodity code
- The **NC Purchase & Contract website** has both alphabetical and numerical listings of all NIGP commodity codes available
- The E-Procurement system contains a **keyword search** for commodity codes when creating an eRequisition

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*The Catalog Search capabilities were improved to help users find items faster.*

These are some of the new catalog search features:

- **Stem search** finds words that contain part of the specified search word (e.g. “battery” will search for “battery” and “batteries”)
- **Fuzzy search** returns exact and highly relevant matches even though search argument words and spelling may not match exactly
- **Side-by-side catalog item comparison** allows two items to be analyzed

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*The eQuote tool did not change with the upgrade, but how it is accessed did.*

- **eQuote** is a tool within NC E-Procurement that can be used to solicit and review quotes from multiple suppliers for a good and/or service. The tool is used for open market purchases that do not require the creation of a Request for Proposal (RFP) in the Interactive Purchasing System (IPS).
- **When should I use eQuote?**
  - The item is not listed on term contract and is less than your school's delegation amount
  - The item is a high dollar volume term contract item under your school's delegation amount
  - A rush order is needed (response within 4 hours)
  - Competitive quotes from 3 or more suppliers are needed



*Many users find eQuote to be an invaluable tool.*

## ■ Benefits of eQuote

- Electronic processing – no paperwork, phone calls, or faxes
- Ability to view a clear audit trail of quote
- Select suppliers by category or search specifically for local, in-state, or HUB suppliers
- Allows each vendor to respond to exact same request for quote
- An unlimited number of suppliers can receive the quote at one time, increasing competition without increasing user effort
- Faster response time from suppliers
- Responses from suppliers with exact items, substitutes, add-ons, and alternatives
- Tabulate responses received
- Award electronically with notification of award sent to vendors

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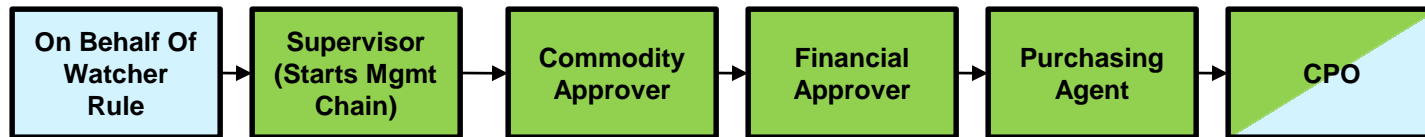
eQuote

**Approval Flows**

Questions & Answers

# Approval Flow Optimization

*The new approval flow facilitates an effective procurement process for the State of North Carolina. It allows procurement professionals to focus on strategic initiatives and narrows the scope of tactical activities.*



- “On Behalf Of” will always assign a watcher, but never an approver
- Agency Security Administrators should set appropriate management levels throughout the Supervisor Chain to provide the right level of oversight with a reasonable approval flow
- Commodity Approvers are triggered by a combination of 5-digit NIGP code and dollar threshold
- Financial Approvers can be mapped by cost center and triggered dollar threshold
- Purchasing Agent groups are mapped by commodity code
  - Agencies with only 1 Purchasing Agent group can map to all commodities with a single entry
- Purchasing Agents approve all non-catalog requisitions to ensure compliance
- Optional rule allows Purchasing Agents to approve catalog requisitions over a combination of commodity code and dollar threshold (i.e. Purchasing Agent approves catalog items over \$2,500.00)
- Chief Procurement Officers can be added to flow as a watcher or an approver based on a combination of commodity and dollar threshold (i.e. CPO approves requisitions greater than \$25,000.00)

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# Training Opportunities

*Online training modules provide a self-paced, on-demand environment in which users can refresh or build their NC E-Procurement knowledge.*

- **Online training modules** provide more detailed training on general system functionality, not just new features:
  - Requisitioning
  - Approving
  - System Navigation
  - System Administrator
  - Advanced Purchasing
  - Reporting
- Online training is **available to users** on the NC E-Procurement web site to access individually on their own schedule
- Training includes **demonstrations** with audio commentary and opportunities for participants to reinforce their knowledge
- Online modules are a valuable asset for **onboarding new employees**
- **Updated Job Aids** and a dedicated **training environment** are also available



## Resources

- If you have further questions, please contact the **NC E-Procurement Help Desk**:
  - Phone: 888-211-7440, option 1
  - Email: [ephelpdesk@its.nc.gov](mailto:ephelpdesk@its.nc.gov)
- Or the **Buyer Adoption Liaison** – Amanda Meyer
  - Phone: 919-424-1965
  - Email: [amanda.meyer@nc.gov](mailto:amanda.meyer@nc.gov)
- You can also access the NC E-Procurement website at <http://eprocurement.nc.gov>